

- - - About the UX Research Project Planner / Tracker Template - - -

I created this tool as a way to document a user experience project in an efficient and collaborative manner. We all know the importance of setting appropriate stakeholder expectations, attaining alignment among contributors and stakeholders, and ensuring that your project schedule, process and data are accessible by all.

This document is my solution to these challenges. It's not perfect, but it functions well as a "one place for everything" project tracker. You can use this tool to frame up the project, identify contributors and approvers, lay out the schedule, design and document your recruiting and session protocols, record your project meeting notes, and even enter your raw notes from observations or interview sessions.

Best of all IMO, your client or stakeholder can comment inline on whatever section you need reviewed. Because I've utilized document headings and subheadings, you can do neat things like tell the client (via email, Slack, semaphore, etc.) something like:

"Hi all, I've drafted the recruit request and put together an initial schedule of session times and dates. Could you please review these and provide comments and/or approvals?"

The recruit request text is here:

<https://docs.google.com/document/foo#heading=recruitheadingID>

The participant schedule is here:

<https://docs.google.com/document/foo#heading=scheduleheadingID>

Some final thoughts:

- Leave the outline sidebar on. It's incredibly useful for jumping between sections.*
- I'd like to add a section for initial data synthesis and analysis.*
- As you read this, you'll see references to other tools that I employ for project work, such as Slack, Google Drive, Moqups, etc. Obviously, use what works for you. But I highly recommend including references to external resources in the project planner itself.*
- I've set permissions as "viewable, copyable and downloadable by all." So you should be able to just save a copy to your own G Drive or download it to use in Word or another document editor.*
- Remember, this is a Creative Commons work, so it's yours to use, modify, adapt, etc. Please share it, improve it, and enjoy!*

- Paul Sherman, 19 February 2019 - paul@shermanux.com

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UX Research Project Planner TEMPLATE

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1. Introduction

This document provides an overview of COMPANY NAME's user research project.

2. Project Stakeholders and Resources

The table below is a “DACI” table, which stands for project **Driver**, project **Approvers**, project **Contributors**, and who needs to be **Informed** about the project’s progress.

Driver	FirstName LastName (usually you, the UX peep)	Email	Phone #
Approver(s)	FirstName LastName	Email	Phone #
	FirstName LastName	Email	Phone #
Contributor(s)	FirstName LastName	Email	Phone #
Informed	FirstName LastName	Email	Phone #
	FirstName LastName	Email	Phone #

3. Resources

Communications

The project team is using Slack to communicate in real time. The channel URL is:
<https://yourawesomeUXproject.slack.com>.

Slack clients are available for most desktop and mobile platforms here:
<https://download.slack.com/>

Remote Research

We are conducting both in-person and remote sessions for this project. The remote research tool is called Validately. The URL for this project is <https://validately.com/yourname/yourproject>

Session Data Storage

We are using Google Drive to store remote and in-person videos for this project. The folder is here: <https://drive.google.com/drive/u/2/folders/xxxxxx/>

Mockups, Wireframes and Workflow Design

Design mockups, wireframes and workflows are accessible in the online tool Moqups. The project is here: <https://app.moqups.com/yourarea/projectname>

4. About the Study

This is where you can frame up the project, set expectations, and achieve alignment.

The objectives of the research are to identify what users need for a minimally-viable product (MVP) XXXXXX management system. The team wants to learn:

- What pain points are COMPETITOR1 and COMPETITOR2 users experiencing?
- What do organization need who want to move off of COMPETITOR1 and don't want to move to COMPETITOR2?
- What is the set of minimum viable features needed for a new web-based system?

5. Recruit: Request, Sample and Schedule

Recruit Request

The draft request for participation appears below.

Subject line: *We want to come and visit you!*

Body:

Hi [name],

COMPANY NAME and OTHER COMPANY NAME are teaming up to better understand how shelters manage their operations using XXXX management systems.

We'd like to peer over your shoulder for a couple of hours as you do your work and briefly chat in person with some people from your organization who use your management system.

*We're confident that learning more about how your team works will help us improve the services we provide to your and other organizations and make your life easier! **Also, we'll make a \$XXX donation to your organization as a thank you gift.***

Would you be willing let us come onsite to observe and ask questions for 2 hours? If so, let us know by responding to this email. We promise that we'll stay out of the way as much as possible.

We also will guarantee that your organization and any individuals we chat with will remain anonymous, and we will not share our findings with anyone outside the team.

Thanks for considering our request, if you're interested, follow this link:

[URL w/ short demog q's and preferred times]

If you have any questions, please feel free to contact [person] at [number], and if there is someone else at your organization who needs to approve this, thanks for passing this email on to them.

Regards,

First Name Last Name, Title, Company Name

First Name Last Name, Title, Company Name

Target Organizations

We are targeting the following organizations and user types for recruiting:

COMPETITOR1 Users

- Add some characteristics of the target users here.

COMPETITOR2 Users

- Add some characteristics of the target users here.

Participants and Schedule

The participants and schedule are listed on this spreadsheet:

<https://docs.google.com/spreadsheets/d/xxxxxxxxxxx>

Optionally, you can use this document to track the schedule using the table below.

Location 1 - November 3-4 20xx

Date & Time	Organization	Current Software	Contact's Email, Phone	Location (Mappable Address)	Observation Team
Nov 3 10am	Company name		Name Email Phone	5880 Blue Jay Way Paramus NJ 08854	PS, AH, AM
etc					

6. Research Protocol

Below is a draft moderator's guide that the team will follow.

Section & Timing	Total Timing: 60 minutes
Intro 5 minutes	<p>Thanks for participating. We really appreciate your time.</p> <p>We're here to learn more about how people in your role organize their workflow and how software like COMPETITOR1 and COMPETITOR2 fit into your workflow. We'd also like to understand what tasks are paper-based or tracked in other tools such as spreadsheets, Word or Google docs, or other digital tools other than your shelter management system.</p> <p>We have a few questions we'd like to ask, but we anticipate that we'll mostly be observing you as you show us what you do and how you do it.</p> <p>We're aiming to spend about 45 minutes with you, but of course since you're on the clock if you need to take care of anything time-sensitive, please feel free to adjust as needed.</p> <p>We'd like to record video at times, so I wanted to make sure you were aware of that before we started. I can assure you that the video we take will only be for our internal use; it will not make its way onto the Internet.</p> <p>Also, if you encounter any issues or don't understand something, that means that we have more work to do to make it easier. So don't blame yourself if you just don't "get" something.</p>

	Do you have any questions before we start?
Current SMS 10 minutes	<p>What shelter management system do you currently use?</p> <p>How long have you been using it?</p> <p>How many people use it in your organization?</p> <p>What do you like best about it? Could you show us?</p> <p>What do you like least? Could you show us?</p>
Most used, most valuable 5 minutes	<p>What features or capabilities of your SMS are most valuable to you personally?</p> <p>Why?</p> <p>What features or capabilities are most valuable to the organization overall?</p> <p>Why?</p>
Other apps and processes 10 minutes	<p>What other applications do you use?</p> <p>Why do you use [tool a, b, c, etc]? We're trying to figure out if you're trying to make up for something that your SMS doesn't do, or doesn't do well.</p>
Observe workflow 10 minutes	<p>Often we find that people can point out additional positive and negative aspects of a product if we watch them use it to accomplish something they typically use it for.</p> <p>Is there anything you're ready to do right now that we could watch? It could be an intake, a daily update, a vet visit schedule, or really any information entry.</p> <p>[If they don't have anything to do]</p> <p>If not, could we watch someone as they perform a typical task?</p>

	<p>Look for:</p> <ul style="list-style-type: none"> - Manual steps - Inefficiencies - Disconnects and double-data entry - Frustrations - Wishes
Incentives to switching 5 minutes	Is there anything about your current SMS that is leading you to evaluate alternative solutions? It could be cost, features, something else, or a combination of things.
Disincentives 5 minutes	<p>Let's say for a moment that for whatever reason, your organization decided that it was time to move off of your current SMS. What would be the biggest hassle in the switching process?</p> <p>Listen for:</p> <ul style="list-style-type: none"> - Data migration - Training - Etc.
"Magic wand" 5 minutes	<p>We've talked about a number of features and capabilities. Now let's say that you could wave a magic wand and start all over again. What would your perfect SMS do?</p> <p>(As applicable)</p> <p>Why would it have to do [thing]?</p> <p>Listen for:</p> <ul style="list-style-type: none"> - Root causes, i.e., I want feature x because I need to do this thing every week and it's a pain in the butt the way I currently do it. - It's more important to identify the underlying business need than what they say they want.
Minimum viable features	OK, now we're taking back the magic wand now. (Sorry!) You just told us about your wish list.

5 minutes	<p>What are the minimum things a new SMS product would have to do for you to consider adopting it?</p> <p>That is, what are your “must haves” and what are you “nice to haves”?</p> <p>I have a list here of shelter management features and capabilities that we’ve gathered in the past. Could you indicate me whether each item is a must have, nice to have, or don’t need? If you need an explanation, we’ll be happy to provide that.</p> <p>[Show list of features]</p>
Wrap-up	<p>Thanks for your time, that was extremely helpful.</p> <p>Do you have any questions for us?</p> <p>If we have any follow-up questions, may we contact you directly? It could be a few short questions via phone, a survey, or even a chance to look at a prototype and provide us feedback.</p> <p>[If yes; confirm contact info]</p>

7. Tasks, Dates, and Responsibilities

The table below details key tasks, deliverable dates responsible parties, and approvers, when applicable.

Task	Responsible	Approver(s)	Start Date	Finish By	Done?
Identify recruit targets	Initials	n/a		13Oct	Yes
Create participant request	Initials	Initials		13Oct	Yes
Start recruit	Initials	n/a	17Oct	variable	Yes
Arrange travel					

Draft protocol / moderator's guide					
Finalize protocol / moderator's guide					
Conduct observations					
Compile data					
Hold in-person debrief					
Deliver final report					

8. Project Notes

Note: It's useful to put most recent notes first.

MVP requirements research project stand-up meeting
20XX-11-13

Put your raw meeting notes here. You can also email them to the project stakeholders. Don't forget to include a link back to this project tracker!

Team discussed the dates for on-site observations. Here is the tentative plan:

Nov 1 - 2: Seattle

Nov 4-6: Arizona

Nov 19-20: Florida

Actions:

- PS to provide boilerplate email, set up date / time spreadsheet.
- Etc.

Project management:

Access the project planner / tracker here:

<https://docs.google.com/document/d/yourprojecttracker>

Meeting notes from 3 November observations
20XX-11-03

Put your raw meeting notes here. You can also email them to the project stakeholders. Don't forget to include a link back to this project tracker!

9. Observation Data

This section is here if you want to use this document to input your data. But using a web-based data collection document is a risky proposition...you might just want to capture notes on your local drive - or paper - and then add them here later.

Observation 1: XXXX Organization

Person 1 - Title, role, job description, etc.

Person 1 - Title, role, job description, etc.

Date of observation

Location of observation

Section & Timing	Total Timing: 60 minutes
Intro 5 minutes	<p>Thanks for participating. We really appreciate your time.</p> <p>We're here to learn more about how people in your role organize their workflow and how software like COMPETITOR1 and COMPETITOR2 fit into your workflow. We'd also like to understand what tasks are paper-based or tracked in other tools such as spreadsheets, Word or Google docs, or other digital tools other than your shelter management system.</p> <p>We have a few questions we'd like to ask, but we anticipate that we'll mostly be observing you as you show us what you do and how you do it.</p> <p>We're aiming to spend about 45 minutes with you, but of course since you're on the clock if you need to take care of anything time-sensitive, please feel free to adjust as needed.</p> <p>We'd like to record video at times, so I wanted to make sure you were aware of that before we started. I can assure you that the video we take will only be for our internal use; it will not make it's way onto the Internet.</p>

	Do you have any questions before we start?
Current SMS 10 minutes	<p>What shelter management system do you currently use?</p> <p>How long have you been using it?</p> <p>How many people use it in your organization?</p> <p>What do you like best about it? Could you show us?</p> <p>What do you like least? Could you show us?</p>
Most used, most valuable 5 minutes	<p>What features or capabilities of your SMS are most valuable to you personally?</p> <p>Why?</p> <p>What features or capabilities are most valuable to the organization overall?</p> <p>Why?</p>
Other apps and processes 10 minutes	<p>What other applications do you use?</p> <p>Why do you use [tool a, b, c, etc]? We're trying to figure out if you're trying to make up for something that your SMS doesn't do, or doesn't do well.</p>
Observe workflow 10 minutes	<p>Often we find that people can point out additional positive and negative aspects of a product if we watch them use it to accomplish something they typically use it for.</p> <p>Is there anything you're ready to do right now that we could watch? It could be an intake, a daily update, a vet visit schedule, or really any information entry.</p> <p>[If they don't have anything to do]</p>

	<p>If not, could we watch someone as they perform a typical task?</p> <p>Look for:</p> <ul style="list-style-type: none"> - Manual steps - Inefficiencies - Disconnects and double-data entry - Frustrations - Wishes
Incentives to switching 5 minutes	<p>Is there anything about your current SMS that is leading you to evaluate alternative solutions? It could be cost, features, something else, or a combination of things.</p>
Disincentives 5 minutes	<p>Let's say for a moment that for whatever reason, your organization decided that it was time to move off of your current SMS. What would be the biggest hassle in the switching process?</p> <p>Listen for:</p> <ul style="list-style-type: none"> - Data migration - Training - Etc.
"Magic wand" 5 minutes	<p>We've talked about a number of features and capabilities. Now let's say that you could wave a magic wand and start all over again. What would your perfect SMS do?</p> <p>(As applicable)</p> <p>Why would it have to do [thing]?</p> <p>Listen for:</p> <ul style="list-style-type: none"> - Root causes, i.e., I want feature x because I need to do this thing every week and it's a pain in the butt the way I currently do it. - It's more important to identify the underlying business need than what they say they want.

Minimum viable features 5 minutes	<p>OK, now we're taking back the magic wand now. (Sorry!) You just told us about your wish list.</p> <p>What are the minimum things a new SMS product would have to do for you to consider adopting it?</p> <p>That is, what are your "must haves" and what are you "nice to haves"?</p> <p>I have a list here of shelter management features and capabilities that we've gathered in the past. Could you indicate me whether each item is a must have, nice to have, or don't need? If you need an explanation, we'll be happy to provide that.</p> <p>[Show list of features]</p>
Wrap-up	<p>Thanks for your time, that was extremely helpful.</p> <p>Do you have any questions for us?</p> <p>If we have any follow-up questions, may we contact you directly? It could be a few short questions via phone, a survey, or even a chance to look at a prototype and provide us feedback.</p> <p>[If yes; confirm contact info]</p>

Observation 1 Debrief

It's a good practice to debrief with your fellow observers after a visit. This is a place to put those notes.

Observation X: XXXX Organization

Person 1 - Title, role, job description, etc.

Person 1 - Title, role, job description, etc.

Date of observation

Location of observation

Section & Timing	Total Timing: 60 minutes
Intro 5 minutes	<p>Thanks for participating. We really appreciate your time.</p> <p>We're here to learn more about how people in your role organize their workflow and how software like COMPETITOR1 and COMPETITOR2 fit into your workflow. We'd also like to understand what tasks are paper-based or tracked in other tools such as spreadsheets, Word or Google docs, or other digital tools other than your shelter management system.</p> <p>We have a few questions we'd like to ask, but we anticipate that we'll mostly be observing you as you show us what you do and how you do it.</p> <p>We're aiming to spend about 45 minutes with you, but of course since you're on the clock if you need to take care of anything time-sensitive, please feel free to adjust as needed.</p> <p>We'd like to record video at times, so I wanted to make sure you were aware of that before we started. I can assure you that the video we take will only be for our internal use; it will not make its way onto the Internet.</p> <p>Do you have any questions before we start?</p>
Current SMS 10 minutes	<p>What shelter management system do you currently use?</p> <p>How long have you been using it?</p> <p>How many people use it in your organization?</p> <p>What do you like best about it? Could you show us?</p> <p>What do you like least? Could you show us?</p>
Most used, most valuable 5 minutes	<p>What features or capabilities of your SMS are most valuable to you personally?</p> <p>Why?</p>

	<p>What features or capabilities are most valuable to the organization overall?</p> <p>Why?</p>
<p>Other apps and processes 10 minutes</p>	<p>What other applications do you use?</p> <p>Why do you use [tool a, b, c, etc]? We're trying to figure out if you're trying to make up for something that your SMS doesn't do, or doesn't do well.</p>
<p>Observe workflow 10 minutes</p>	<p>Often we find that people can point out additional positive and negative aspects of a product if we watch them use it to accomplish something they typically use it for.</p> <p>Is there anything you're ready to do right now that we could watch? It could be an intake, a daily update, a vet visit schedule, or really any information entry.</p> <p>[If they don't have anything to do]</p> <p>If not, could we watch someone as they perform a typical task?</p> <p>Look for:</p> <ul style="list-style-type: none"> - Manual steps - Inefficiencies - Disconnects and double-data entry - Frustrations - Wishes
<p>Incentives to switching 5 minutes</p>	<p>Is there anything about your current SMS that is leading you to evaluate alternative solutions? It could be cost, features, something else, or a combination of things.</p>
<p>Disincentives 5 minutes</p>	<p>Let's say for a moment that for whatever reason, your organization decided that it was time to move off of your current SMS. What would be the biggest hassle in the switching process?</p>

	<p>Listen for:</p> <ul style="list-style-type: none"> - Data migration - Training - Etc.
<p>“Magic wand” 5 minutes</p>	<p>We’ve talked about a number of features and capabilities. Now let’s say that you could wave a magic wand and start all over again. What would your perfect SMS do?</p> <p>(As applicable)</p> <p>Why would it have to do [thing]?</p> <p>Listen for:</p> <ul style="list-style-type: none"> - Root causes, i.e., I want feature x because I need to do this thing every week and it’s a pain in the butt the way I currently do it. - It’s more important to identify the underlying business need than what they say they want.
<p>Minimum viable features 5 minutes</p>	<p>OK, now we’re taking back the magic wand now. (Sorry!) You just told us about your wish list.</p> <p>What are the minimum things a new SMS product would have to do for you to consider adopting it?</p> <p>That is, what are your “must haves” and what are you “nice to haves”?</p> <p>I have a list here of shelter management features and capabilities that we’ve gathered in the past. Could you indicate me whether each item is a must have, nice to have, or don’t need? If you need an explanation, we’ll be happy to provide that.</p> <p>[Show list of features]</p>
<p>Wrap-up</p>	<p>Thanks for your time, that was extremely helpful.</p>

	<p>Do you have any questions for us?</p> <p>If we have any follow-up questions, may we contact you directly? It could be a few short questions via phone, a survey, or even a chance to look at a prototype and provide us feedback.</p> <p>[If yes; confirm contact info]</p>
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Observation X Debrief

It's a good practice to debrief with your fellow observers after a visit. This is a place to put those notes.